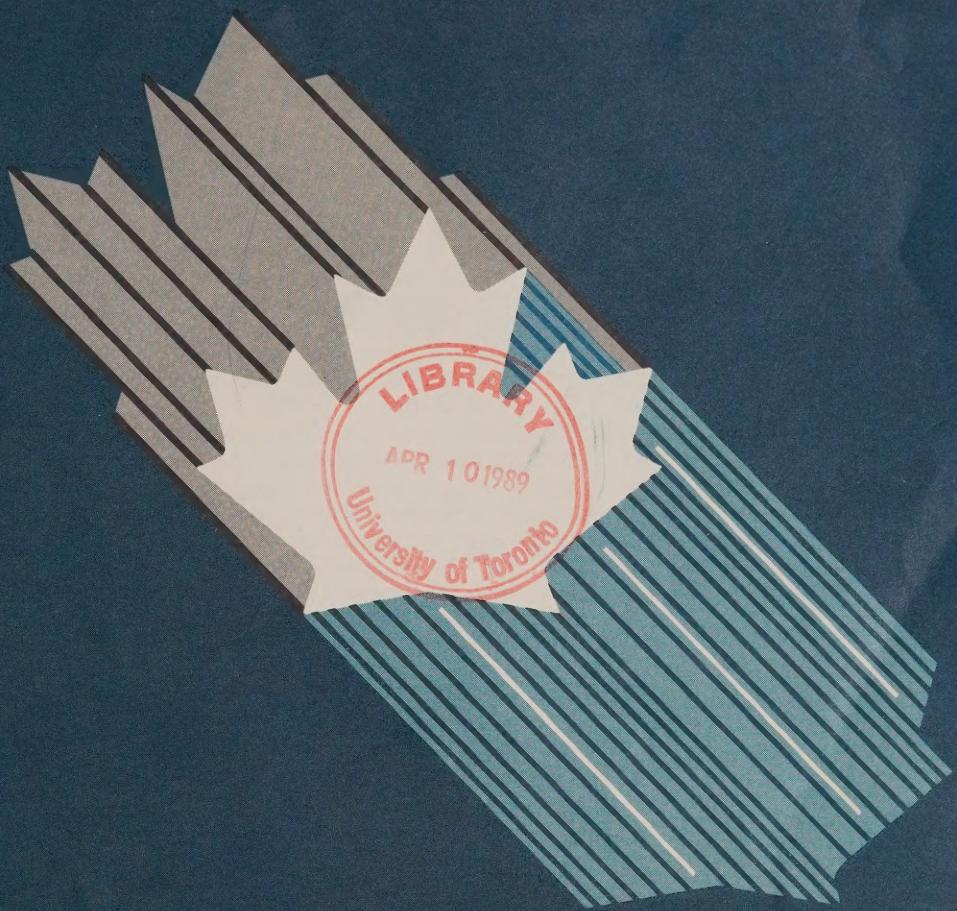


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I N D U S T R Y
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Industrie, Sciences et
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Consumer Electronics

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INDUSTRY

PROFILE

CONSUMER ELECTRONICS

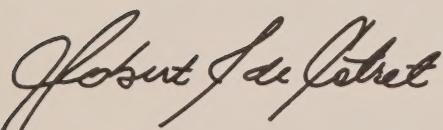
1988

FOREWORD

• • • • •

In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to survival and growth. This Industry Profile is one of a series of papers which assess, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological and other key factors, and changes anticipated under the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the papers.

The series is being published as steps are being taken to create the new Department of Industry, Science and Technology from the consolidation of the Department of Regional Industrial Expansion and the Ministry of State for Science and Technology. It is my intention that the series will be updated on a regular basis and continue to be a product of the new department. I sincerely hope that these profiles will be informative to those interested in Canadian industrial development and serve as a basis for discussion of industrial trends, prospects and strategic directions.



Minister

Canada

1. Structure and Performance

Structure

Consumer electronics include television sets, radios, domestic sound reproduction equipment, audio and video recorders and automobile stereo equipment. Not included are the newly emerging home satellite TV receivers. The Canadian industry supplies only certain product niches for the consumer electronics market. There are five TV assemblers (one of which manufactures colour TV picture tubes), one car radio manufacturer and a few smaller producers of stereo equipment and loudspeaker systems. This profile's main focus is the television receiver sub-sector as it dominates the Canadian electronics industry. Not included are wholesalers, distributors or sales and retail outlets.

In 1986, industry shipments accounted for \$600 million, with Canadian production supplying almost 20 percent of domestic demand. Exports were valued at \$192 million and were destined almost exclusively for the U.S. market. Imports supplied 80 percent of the domestic market and were valued at \$1707 million. Japan, the United States and, to a lesser extent, the Republic of Korea and Taiwan, were the principal sources of imports. In 1986, total employment in the industry was 3000. Approximately 17 companies are currently active in this industry.

The industry is predominately foreign owned. Little research and development (R&D) is carried out in Canada by the major suppliers and there is only a limited production engineering capability. All major Canadian plants are located in Quebec and Ontario, which account for 99 percent of total shipments.

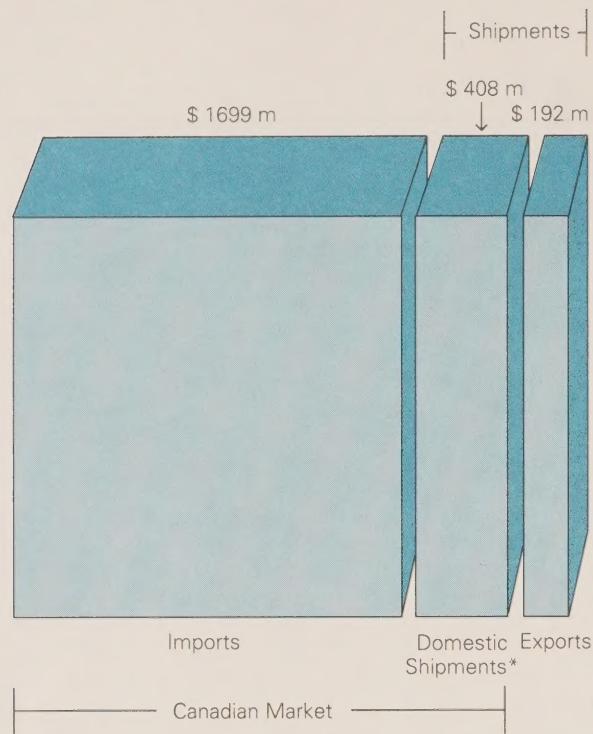
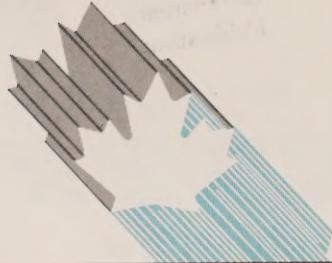
TV assemblers, accounting for more than 55 percent of shipments, are branch plants that carry out final assembly of parts kits largely for the domestic market. The Canadian industry has concentrated its production on larger colour TV sets (50.8 cm and 66 cm or 20 in. and 26 in.) which account for 90 percent of total TV shipments. Black and white sets are no longer produced in Canada — they are imported primarily from the Republic of Korea. Canada also has one picture tube facility — Mitsubishi Electronics Industries Canada Inc. of Midland, Ontario, which supplies the Canadian and U.S. markets.

TV assembly plants employ approximately 1300 workers with a further 700 persons employed by their principal suppliers — cabinet and cabinet parts assemblers.

The only car-radio operation in Canada is a U.S. subsidiary, Ford Electronics Manufacturing Corporation, which produces radios for other Ford divisions, mainly in the United States. Employing approximately 1000 workers, Ford Electronics operates under the conditional duty-free provisions of the Canada-U.S. Automotive Products Trade Agreement (Auto Pact) implemented in 1965. The company serves a rationalized North American automotive market and has the advantage of a captive market in the North American Ford divisions.

The stereo and loudspeaker components manufacturers employ approximately 700 workers. Their plants are small and serve mainly the domestic market. Although primarily foreign owned, this sub-sector also includes a few well-established Canadian manufacturers.

Industry, Science and
Technology CanadaIndustrie, Sciences et
Technologie Canada



*Imports, Exports and Domestic Shipments
1986*

* ISTC estimate

The structure of the Canadian industry is best understood within the context of the ongoing reorganization of the global consumer electronics industry and the internationalization of world markets and production systems. The last decade has witnessed two significant trends. The first trend is in the consumer electronics markets in developed countries. Fierce competition for market share and leadership has resulted in the rapid growth (and decline) of particular product groups. The industry is characterized by a constant search for new products as the market for "standard" products becomes saturated. A dramatic innovation in recent years is the video cassette recorder (VCR). The second significant trend is the ascendancy of Japanese firms in every major market. Japanese products are recognized to be superior in both technology and quality, and are rapidly becoming the defacto standard for the industry worldwide.

To maintain their leadership position, the Japanese are following certain strategies, one of which is to invest substantial R&D funds in new product development. These high-technology products are principally produced in Japan. Manufacturing of older technology (i.e., standard products such as radios and tape players) is being transferred to other Asian countries with lower labour costs — the Republic of Korea and Taiwan for example.

All the dominant consumer electronics firms exhibit a high degree of vertical integration and an ongoing capital commitment to engineering and production automation. The result is that the major plants, primarily located in Asia, are highly efficient, world-scale operations which can achieve low-cost production unmatched elsewhere. Among newly industrialized countries, the Republic of Korea is becoming a significant player in the worldwide consumer electronics industry as a supplier of older technology, portable TV sets, which are sold as commodity items. The South Koreans have gained sufficient market share to take advantage of economies of scale.

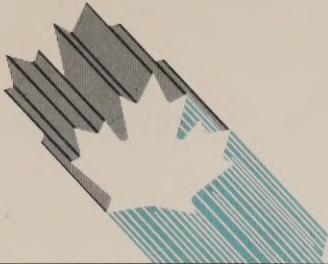
The competition from Japan and low-cost production centres has resulted in a reorganization and realignment of the consumer electronics industry in other developed countries. The North American industry, in particular, has undergone a shake-up. Zenith is the only remaining U.S. manufacturer. In Europe, production has rationalized around a small group of independent companies which are increasingly adopting international, outward-looking strategies in order to survive. The adjustment problems caused by the emergence of Japan and other Asian countries have resulted in protectionist measures by governments of some developed countries. Another result is "defensive" investments by the Japanese (and more recently the Koreans) in importing countries to ensure continued market access.

The United States is the world's most lucrative market for consumer electronics and has also emerged as a major foreign production site for Asian producers. These branch plants carry out the final assembly of parts kits supplied by the parent. Because they are not vertically integrated, these plants are generally less efficient than the parent plants. The Canadian TV assembly plants are typical — they are domestically oriented and currently only a small portion of their production reaches the export market. However, the Ford Electronics car-radio plant and the Mitsubishi picture-tube plant are exceptions. They are highly automated and oriented towards the larger North American market.

From a general perspective, the North American industry, whether located in the United States or in Canada, faces severe competition from Japan, the Republic of Korea, Taiwan, Malaysia, Mexico and Brazil. Within the North American context, the principal competitors of Canadian plants are sister facilities in the United States.

Performance

In the last 15 years the Canadian consumer electronics industry has been shrinking. Import penetration has increased and employment has dropped from more than 7500 in 1971 to an estimated 3000 in 1988.



In particular, the TV assembly industry in Canada has undergone a fair amount of restructuring and consolidation during this period. Import penetration from Asia as well as from the United States has left TV assemblers operating well below capacity (around 50 percent). In 1984, the industry shipped approximately 700 000 sets (about 50 percent of the domestic market), with 10 percent of total production exported to the United States. The relatively large share of the domestic market held by domestic shipments, however, disguises the real level of import penetration in parts and components in the TV assembly sub-sector.

In contrast to the domestically oriented TV assembly facilities, the Mitsubishi picture-tube plant is where substantial capital investments have been made. At full capacity the plant can supply approximately 10 percent of the North American market. These picture tubes have made substantial inroads on the U.S. market, overcoming a U.S. tariff of 15 percent.

Ford Electronics, the single Canadian manufacturer of car radios, has also performed strongly in both shipments and exports. The Canadian plant has benefited from significant investments in the latest manufacturing equipment.

Canadian loudspeaker manufacturers have steadily increased their market share through reliable engineering, good marketing and competitive pricing. Estimates indicate that at least 50 percent of the speakers sold in Canada are made by Canadian producers, either under foreign brand names or as part of the growing number of Canadian brand names.

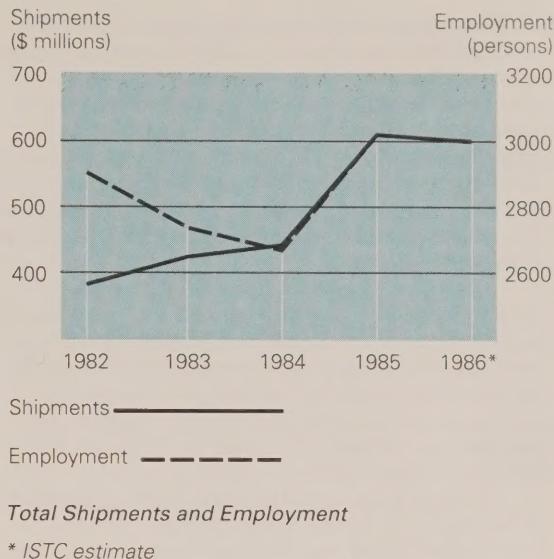
The consumer electronics industry in Canada has been profitable throughout the 1980s.

2. Strengths and Weaknesses

Structural Factors

At the upper end of the international consumer electronics market, product design and quality are sources of comparative advantage. Brand loyalty is also a factor which may allow well-known companies to charge a premium for their products. Across the market spectrum, but particularly at the "commodity" end of the market, low production costs are critical to international competitiveness. Economies of scale, product and manufacturing technologies, and labour cost advantages separate the winners from the losers. To a certain extent, labour cost advantages can be offset by process technology and automation, particularly for the more sophisticated products.

Canada has essentially no indigenous consumer electronics industry. With the exception of some parts of the loudspeaker sub-sector, all other Canadian production is composed of foreign-owned assembly plants which import a major portion of their parts and components.



Total Shipments and Employment

* ISTC estimate

In the TV sub-sector, Canadian plants are semi-automated and domestically oriented. They cannot compete on an equal footing with plants in the Far East. Within the North American context, they suffer from having to serve a far smaller Canadian market, compared to the U.S. market. In the production of TV consoles, Canadian companies have a small advantage because of the product's bulkiness, which gives local suppliers an advantage in regional markets. Whereas Canadian content for most colour television sets is very low, the bigger TV consoles have a Canadian content in excess of 50 percent.

The two larger Canadian plants, Ford Electronics and Mitsubishi (picture tubes), have invested in automation and production technology geared to the whole North American market, so that they are competitive compared to similar facilities in the United States.

In the loudspeaker sub-sector of the industry, Canadian firms have strong R&D and engineering capabilities. In addition, because the product's bulkiness gives an advantage to local production, this area is one niche of the consumer electronics market in which Japanese and other Asian producers are not particularly strong.

Trade-related Factors

The only market relevant to Canadian producers is North America. The European Community (E.C.) has taken a number of measures to protect domestic suppliers against imports. These include the establishment of unique national standards which incorporate patents held by local suppliers, and the introduction of import quotas.



Canadian tariffs on consumer electronics are: loudspeakers and amplifiers, 9.8 percent; turntables, free to 5.5 percent (depending on changing mechanism); video recording or reproduction apparatus, 9.5 percent; radios, free; colour home television sets from 7.5 percent to 8.2 percent (depending on tube size); black and white home television sets, free; and color TV tubes, 9.3 percent. Parts kits imported by Canadian TV assembly plants enter duty-free.

The United States has the following tariff structure: loudspeakers and amplifiers, 4.9 percent; turntables, free to 3.9 percent (depending on changing mechanism); video recording or reproduction apparatus, 3.9 percent; domestic television sets (colour), five percent; domestic television sets (B&W), five percent; and colour TV tubes, 15 percent.

Under the Canada-U.S. Free Trade Agreement (FTA), tariffs on consumer electronics products will be phased out over a 10-year period beginning January 1, 1989. In addition, new rules of origin will be introduced — requiring that 50 percent of the total, direct manufacturing costs be incurred in North America (Canada and/or the United States). Vehicles and parts must meet this new 50-percent North American rule of origin which is higher than the current Canada-U.S. Auto Pact requirements.

Technological Factors

With the exception of the loudspeaker sub-sector, there is little R&D or product engineering in the Canadian consumer electronics industry. In this respect, Canadian and U.S. TV assemblers (with the exception of Zenith) are similar. Prior to 1980, the consumer electronics industry in North America (primarily colour TV set production) was sustained by the use of patent protection based on unique broadcast standards. By 1980, most of the existing patents had expired, the colour TV market was saturated and the standards for new products, representing future sales, were based on products developed in Japan. This situation caused a major change in the industry for all firms, since many no longer had access to the new manufacturing technologies developed by the Japanese. As a result, those which could not compete have ceased production. In Canada, therefore, producers rely totally on foreign design and production technology.

Canadian TV assemblers produce on such a small scale that automated techniques are not as appropriate as in larger facilities in the United States and the Far East. Where production is geared to the whole North American market (car radios and picture tubes), plants are automated and compare favourably with U.S. facilities.

In the loudspeaker sub-sector, Canadian companies have developed solid engineering and R&D capabilities. They are supported by the National Research Council's (NRC) test facilities in designing new speakers and upgrading existing designs.

3. Evolving Environment

The consumer electronics market as a whole is expected to continue to grow moderately. There is real potential, however, for rapid development and introduction of new mass-market products which will penetrate a high number of households. Products expected to dominate the market in the 1990s can already be identified — "intelligent" VCRs, compact-disc players, audio-fidelity tape recorders, stereo TVs, large-screen and high-definition TVs, and compact camera recorders. The Japanese are expected to continue their dominance of the world marketplace. European firms, however, are also in the race to develop next generation TV sets. Within this environment, there is also potential for low-cost suppliers. The Republic of Korea has been successful in the TV market and has now entered the video recorder market. China is beginning to develop its TV industry.

Within North America, it is expected that some production will remain in the United States and Canada. The U.S. market is the single, most lucrative market for consumer electronics, and major suppliers will continue to invest in facilities there. Canada, although an attractive and substantial market, will have to compete with the United States for foreign investment. It is possible that further Japanese and Korean firms will invest here. Other possibilities include joint-venture production in Canada with foreign, primarily Asian, partners.

The United States will be changing its trade regime. Effective January 1989, the duty-free status that the Republic of Korea, Taiwan, Hong Kong and Singapore have enjoyed under the Generalized System of Preferences (GSP) will be withdrawn. This means that these four Asian countries will be elevated to the ranks of developed countries and their consumer electronics products will enter the United States at the same tariff rates as similar products from Japan and the Federal Republic of Germany.



The changes under the FTA, coupled with the above changes in the GSP in the United States, are expected to have a positive impact on the Canadian consumer electronics industry. The elimination of the 15 percent American tariff on colour TV tubes will assist Mitsubishi exports to the United States. The company has already made inroads on the U.S. market despite this tariff. Ford Electronics may benefit from the new rules of origin under the FTA, which are higher than the current Canada-U.S. Auto Pact requirements. These rules should result in increased procurement of auto parts in North America by both North American manufacturers and Asian manufacturers based in the United States and Canada. In the loudspeaker sub-sector, Canadian manufacturers have not been export oriented. However, the current development of technologically sophisticated products may mean that these companies will seek new markets in the United States. The removal of the U.S. tariff can be expected to encourage this process. For TV assembly plants, the FTA is expected to have a neutral impact.

4. Competitiveness Assessment

Asian suppliers have significant cost and technological advantages (both in manufacturing and products) over North American and European manufacturers. With no protectionist measures in non-Asian developed countries and defensive investments on the part of Asian firms, the majority of the industry would be located in the Far East.

The Canadian TV assembly industry is composed of Asian-owned facilities which produce mainly for the Canadian market and are smaller and less efficient than the parents' Asian operations. Consumer electronic imports from Japan, the Republic of Korea, Taiwan, Hong Kong and Singapore have increased dramatically in recent years. This trend is expected to continue. The largest plants in the Canadian consumer electronics industry are comparable to facilities in the United States and are competitive within North America. Canadian manufacturers are strong in the small-volume loudspeaker sub-sector, where they are developing technologically superior products.

The overall impact of the FTA on the industry is expected to be positive. The tariff removal should particularly benefit the Canadian car-radio and picture-tube facilities. Canadian loudspeaker manufacturers should also benefit over the longer term.

For further information concerning the subject matter contained in this profile, contact:

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Ottawa, Ontario
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(613) 952-8417



PRINCIPAL STATISTICS

SIC(s) COVERED: 3341 (1980)

	1982	1983	1984	1985	1986
Establishments	16	16	16	17	17 ^e
Employment	2 906	2 749	2 676	3 008	3 000 ^e
Shipments (\$ millions)	391	417	439	604	600 ^e
Gross domestic product (constant 1981 \$ millions)	118.7	156.5	200.2	232.0	281.1
Investment (\$ millions)	11.5	6.3	24.2	27.2	18.6
Profits after tax (\$ millions)	12.9	23.3	32.3	7.9	N/A

TRADE STATISTICS

	1982	1983	1984	1985	1986	
Domestic Exports (\$ millions)	120	149	178	199	192	
Re-exports (\$ millions)	7	6	7	7	8	
Total exports (\$ millions)	127	155	185	206	200	
Domestic shipments (\$ millions)	271	268	261	405	408 ^e	
Imports (\$ millions)	882	1 176	1 655	1 563	1 707	
Canadian market (\$ millions)	1 146	1 438	1 909	1 961	2 107 ^e	
Exports as % of shipments	30.7	35.7	40.5	33.0	32.0	
Imports as % of domestic market	77.0	81.4	86.4	79.4	80.7	
Source of imports (% of total value)	U.S.	Japan	Republic of Korea	Taiwan	Other Asia	Others
1982	29	45	7	7	6	6
1983	23	50	8	5	6	8
1984	23	50	9	5	6	7
1985	26	46	8	6	5	9
1986	28	43	9	7	4	9
Destination of exports (% of total value)	U.S.	U.K.	Other Europe		Others	
1982	74	20	4		2	
1983	90	8	1		1	
1984	97	—	1		2	
1985	96	—	2		2	
1986	96	—	4		—	

(continued)



REGIONAL DISTRIBUTION — Average over the last 3 years

	Atlantic	Quebec	Ontario	Prairies	B.C.
Establishments – % of total	—	35	65	—	—

MAJOR FIRMS

Name	Ownership	Location of Major Plants
Hitachi (HSC) Canada Ltd.	Japanese	Montréal, Quebec
Matsushita Industrial Canada Ltd.	Japanese	Toronto, Ontario
Thomson Consumer Electronics Canada Inc.	American	Prescott, Ontario
Sanyo Canada Inc.	Japanese	Montréal, Quebec
Mitsubishi Electronics Industries Canada Inc.	Japanese	Midland, Ontario
Mitsubishi Electric Sales Canada Inc.	Japanese	Waterloo, Ontario
Bose Canada Inc.	American	Ste-Marie, Quebec
Audiosphere Audio Research Corp. Ltd.	Canadian	Toronto, Ontario
Ford Electronics Manufacturing Corporation	American	Toronto, Ontario
Apollo Electronics Limited.	Canadian	Toronto, Ontario
Global Sound Systems Ltd.	Canadian	Toronto, Ontario

e ISTC estimate
N/A Not available

Note: Statistics Canada data have been used in preparing this profile.



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Nom	Propriété	Emplacement	Établissements (en %)
Hitachi (HSC) Canada Ltd.	japonaise	Montréal (Québec)	—
Matsushita Industrial Canada Ltd.	japonaise	Toronto (Ontario)	—
Thomson Consumer Electronics Canada Inc.	américaine	Prescott (Ontario)	Thomson Consumer Electronics
Sanyo Canada Inc.	japonaise	Montréal (Québec)	—
Mitsubishi Electronics Canada Inc.	japonaise	Midland (Ontario)	Mitsubishi Electric Sales
Canada Inc.	japonaise	Waterloo (Ontario)	Mitsubishi Electric Sales
Bose Canada Inc.	américaine	Sainte-Marie (Québec)	—
Audiosphere Audio Research Corp. Ltd.	canadienne	Toronto (Ontario)	Audiosphere Audio Research Corp. Ltd.
Ford Electronics Manufacturing Corporation	américaine	Toronto (Ontario)	Ford Electronics Manufacturing Corporation
Corporate	canadienne	Toronto (Ontario)	Corporate
Apollo Electronics Limited	canadienne	Toronto (Ontario)	Apollo Electronics Limited
Global Sound Systems Ltd.	canadienne	Toronto (Ontario)	Global Sound Systems Ltd.

Les données utilisées dans ce profil proviennent de Statistique Canada.

* Les montants individuels sont exprimés en millions de dollars constants de 1981.

** Les montants individuels sont exprimés en millions de dollars constants de 1981.

é Estimations.

PRINCIPALES SOCIÉTÉS

Atlantique	Québec	Ontario	Prairies	C.-B.
—	35	65	—	—

ÉLECTRONIQUE MÉDIALE — Attaque des débarquements uniques

PRINCIPALES STATISTIQUES

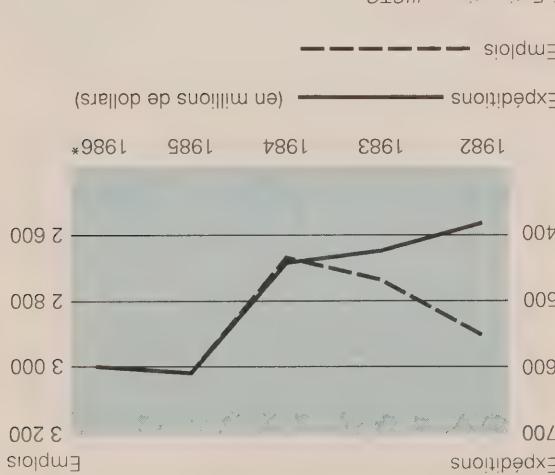
CTI 3341 (1980)

Etablissements	16	16	16	17	17e
Emplois	2 906	2 749	2 676	3 008	3 000e
Expéditions*	391	417	439	604	600e
Produit intérieur brut**	118,7	156,5	200,2	232,0	281,1
Investissements*	11,5	6,3	24,2	27,2	18,6
Bénéfices après impôts*	12,9	23,3	32,3	7,9	n.d.
STATISTIQUES COMMERCIALES					
Exportations*	120	149	178	199	192
Total des exportations*	127	155	185	206	200
Expéditions internes*	271	268	261	405	408e
Marché intérieur*	882	1 176	1 655	1 563	1 707
Importations*	1 146	1 438	1 909	1 961	2 107e
(en % des expéditions)	30,7	35,7	40,5	33,0	32,0
Importations (en % du marché intérieur)	77,0	81,4	86,4	79,4	80,7
Source des importations (en %)	E.-U.	Corée	Taiwan	d'Asie	Autres
Destinatation des exportations (en %)	E.-U.	G.-B.	Autres pays d'Europe	Autres	

1982	29	45	7	6	6
1983	23	50	8	6	6
1984	23	50	8	6	8
1985	26	46	9	6	7
1986	28	43	9	7	4
1987	20	—	—	2	2
1988	74	—	4	2	1
1989	90	8	1	1	1
1990	97	—	—	—	—
1991	96	—	—	—	—
1992	96	—	—	—	—

3. Evolution de l'environnement

Mais cette situation a entraîné bien des changements dans cette industrie, puisque de nombreux entreprises n'avaient plus accès aux fin à leurs activités. Depuis, les fabricants canadiens ont du mal à concurrencer, elles sont au point par les techniques plus mises au point par les japonais, ne pouvant plus mises au point par les japonais, ne fin à leurs activités. Depuis, les fabricants canadiens ont du mal à concurrencer, elles sont au point par les japonais, ne sur une échelle si réduite que les techniques automatiques se fait au Canada dans les grandes sociétés des États-Unis et d'Europe. D'ores et déjà, la production est destinée à l'ensemble des radios d'automobile et des autres appareils de radio du marché nord-américain, entre autres celles usines canadiennes sont très automatisées et se comparent très bien aux installations américaines. Dans le secteur des haut-parleurs, les sociétés canadiennes disposent aujourd'hui d'excellents services de conception et de R-D et elles peuvent profiter des laboratoires d'essai du Conseil national de recherches du Canada pour la mise au point et l'amélioration de produits.



Facteurs liés au commerce

Facteurs technologiques

GRAND PUBLIC
ELECTRONIQUE

Pour conserver leur avance, les Japonais ont adopté certaines stratégies; entre autres, ils investissent massivement dans la R-D pour les produits de pointe qui sont le plus souvent fabriqués au Japon. Pour les articles moins récents, donc soit caractérisées par leur volonté d'investir dans la conception verticale et leur haut degré d'intégration horizontale. Parmi les pays nouveaux à des coûts inégalés, la Corée du Sud joue un rôle de plus en plus important dans l'industrie de l'électronique grand public en tant que fournisseur de produits courants industriels, la Corée du Sud joue un rôle de plus en moins récents, comme les téléviseurs portatifs.

Ce dernier pays s'est taillé une place de marché suffisante pour réaliser des économies d'échelle. La concurrence livrée par le Japon et les centres a connu de nombreux bouleversements. Actuallement, Zenith est la seule entreprise en activité aux Etats-Unis. En Europe de l'Ouest, les groupes de sociétés indépendantes qui, pour survivre, adoptent progressivement des stratégies d'envergure internationale, orientées vers le marché extérieur. Face à la montée du Japon et d'autres pays d'Asie, les gouvernements de certains pays industriels ont adopté des mesures protéctionnistes. Pour leur part, le Japon et, privilégie choisir par les fabricants asiatiques pour promettre de cette industrie et son remplacement systématique dans l'assemblage déjà présent de ces usines d'intégration verticale, le rendement de ces usines est généralement inférieur à celui de leur société mère. Les usines canadiennes de montage de Ford Electronics sont une faille proportionnelle à celle de radios d'automobiles. Deux usines font exception : celle de radios d'automobiles Ford Electronics sont un exemple typique; leur téléviseurs en sont un autre.

Mitsubishi, leur production très automatisée est dépendant une partie importante de leur exportée. Deux entreprises sont surtout destinée au marché intérieur, une fort exceptionnelle : celle de tubes-imageries produites par leur société mère. En l'absence de spécialistes dans l'assemblage déjà présent de ces usines, y établir. Ces derniers vont ouvrir des usines privilégier choisit par les fabricants asiatiques pour promettre de cette industrie et son remplacement systématique dans l'assemblage déjà présent de ces usines d'intégration verticale, le rendement de ces usines est généralement inférieur à celui de leur société mère. Les usines canadiennes de montage de Ford Electronics sont une faille proportionnelle à celle de radios d'automobiles. Deux usines font exception : celle de radios d'automobiles Ford Electronics sont un exemple typique; leur téléviseurs en sont un autre.

Les Etats-Unis restent le marché le plus investissemens massifs dans les pays importateurs pour y assurer leur accès et le conserver. Les pays d'Asie, les gouvernements de certains pays industriels ont adopté des mesures protéctionnistes. Pour leur part, le Japon et, privilégie choisir par les fabricants asiatiques pour promettre de cette industrie et son remplacement systématique dans l'assemblage déjà présent de ces usines d'intégration verticale, le rendement de ces usines est généralement inférieur à celui de leur société mère. Les usines canadiennes de montage de Ford Electronics sont une faille proportionnelle à celle de radios d'automobiles. Deux usines font exception : celle de radios d'automobiles Ford Electronics sont un exemple typique; leur téléviseurs en sont un autre.

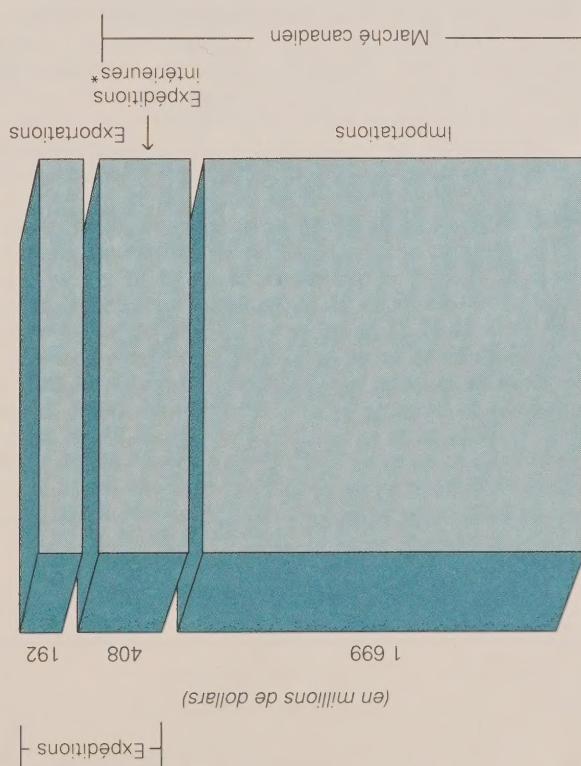
Les tabacchiots de compositions de chaînes stéréo de haute-pureur sont utilisés pour la préparation essentielle aux besoins du marché intérieur. Même si la propriété étrangère domine ce sous-secteur, il complète cependant quelques fabricants canadiens bien connus.

Pour bien comprendre l'organisation de cette industrie canadienne, il faut la replacer dans le cadre de la rationalisation accutelle des activités pour publier, et de l'internationalisation des marchés et des systèmes de fabrication. Depuis 10 ans, il faut noter 2 grandes tendances. D'une part, sur les marchés des pays industrialisés, certains types de produits canalisent une croissance ou un déclin rapide, en raison de la proximité de la concurrence pour accaparer le marché et les premières places. Ce secteur se caractérise par la recherche constante de nouveauax produits afin d'éviter la saturation du marché en produits ordinaires. Le magneoscope ou « video » est un exemple d'innovation récente.

D'autre part, les produits japonais, qui s'imposent rapidement grâce à leur supériorité technique, ont par leur qualité et leur prix dans le monde la norme et sont devenus partout dans les marchés importants habituelle de référence.

* Estimations d'ISTC.

988 - importations, exportations et expéditions



1. Structure et rendement

STRUCTURE

Les électrodiagrammes grand public, ou designé en général une multitude de produits tests que télévisions, radios, matériels d'énergie destinés du son à usage domestique, magnétoscopes et chaîne stéréo pour automobiles;

électronique, mais ne porte pas sur la distribution : grossistes, revendeurs et détaillants

En 1988, cette industrie, qui emploie près de 3 000 personnes, regroupe plus de 600 millions de sociétés dans l'activité. Ses exportations s'élèvent alors à 20 p. 100 de la demande intérieure et les Etats-Unis achètent la quasi totalité des exportations évaluées à 192 millions de dollars. Les importations, d'une valeur de 1707 millions, assurent 80 p. 100 de la demande intérieure; elles proviennent surtout du Japon, des Etats-Unis, de Corée du Sud et de Taiwan. Cette industrie est dominée par des sociétés sous contrôle étranger. Ces plus grandes font peu de R-D au pays et y mènent peu d'activités de conception de produits. C'est au Québec et en Ontario que se trouvent toutes les grandes usines qui, dans l'ensemble, assurent 99 p. 100 des expéditions.

Le 25 p., 100 des expéditions, sont des filiales spécialisées dans l'assemblage des jeux de pièces détachées, destinées avant tout à la vente au détail. L'industrie canadienne fabrique surtout des télécompteurs de 50,8 et de 66 cm, constituant environ 90 p. 100 du total des expéditions de télésieurs. Les télésieurs en noir et blanc ne sont plus fabriqués au Canada; ils sont importés en grande partie de la Corée du Sud. En outre, la seule usine de tubes-images au Canada, soit celle de Mitsubishi Electronics Industries Canada Inc. à Midland en Ontario, dessert le marché canadien et américain. Environ 1 300 personnes travaillent dans les usines de montage de télésieurs et 700 chez leurs principaux fournisseurs, soit les fabricants de meubles et d'éléments.

La seule usine de radios d'automobile au Canada appartient à Ford Electronics Manufacturing Corporation, une filiale de la multinationale américaine Ford spécialisée dans la fabrication de postes de radio pour quinze emploie environ 1 000 personnes, surtout ses activités en vertu des dispositions de franchise conditionnelle définies par le Pacte de l'automobile de 1965. Cette société desserte le marché nord-américain des véhicules automobiles reconnue comme étant le plus important du marché mondial.

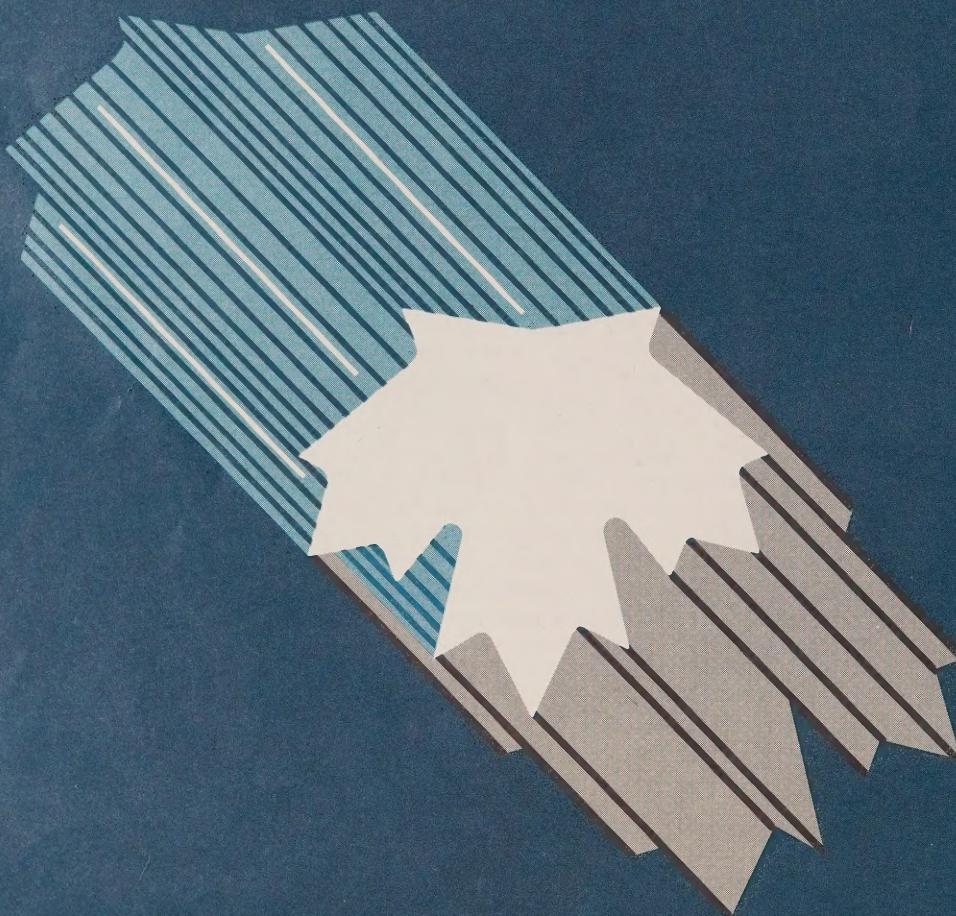
Ministre
Affaires étrangères

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Électrounique grand public

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